

**Commonwealth of Massachusetts
Executive Office of Health and Human Services**

Virtual Gateway



Submitting SDRs and Invoices EIM/ESM

Spring 2006 DRAFT – FOR PILOT USE ONLY

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Chapter 1: Getting Started

What is the Virtual Gateway?

The Virtual Gateway is a single point on the Internet for accessing Health and Human Services programs and services. The ultimate goal of the Virtual Gateway is to streamline service access and coordinate service delivery. It serves three important groups:

- Internal Health and Human Services staff
- Service provider staff
- Consumers

The Virtual Gateway offers:

- **Catalog:** An online catalog with descriptions of several of the most widely used programs in Health and Human Services.
- **Screening & Referral:** A short online survey for consumers and providers to determine potential eligibility for select EOHHS programs. Multiple services can be assessed at the same time.
- **Common Intake:** A single, online data collection tool for registered providers to create applications for multiple EOHHS programs on behalf of clients. (Login required.)

As well as many other targeted services.

This chapter provides information specific to:

- Accessing Virtual Gateway
 - Password Management
 - Accessing online help
-



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Accessing the Virtual Gateway

To Access Provider Services through the Provider page:

1. Open an Internet Explorer session.
2. Type web address <http://www.mass.gov/cohhs> in browser.
3. Select **Provider Services Gateway Enter>>**



Tip: Once you are in the Virtual Gateway, you must use the navigation tools that are part of the application not the Internet Explorer **Back** and **Forward**.



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Accessing Virtual Gateway, (continued)

You will be directed to the Business Services page for login.


Health and Human Services **Mass.gov**

April 13, 2006 **CONSUMER** **PROVIDER** **RESEARCHER** **GOVERNMENT**

[Mass.Gov Home](#) [State Government](#) [State Online Services](#)

Virtual Gateway Business Services

The Virtual Gateway offers a new way to access health and human service programs. To get started, login to the right, or learn how to [become an authorized user](#). The following online services are currently available:



Catalog: An online catalog with descriptions of several of the most widely used programs in Health and Human Services.

Screening & Referral: A short online survey for consumers and providers to determine potential eligibility for select EOHHS programs. Multiple services can be assessed at the same time.

Intake: A single, online data collection tool for registered providers to create applications for multiple EOHHS programs on behalf of clients. (Login required.)

Homeless Management: An online data collection, case management, and reporting tool for registered homeless shelters and providers to manage daily operations within their organizations. (Login required.)

Mental Retardation Quality Management Reporting (HCSIS): An online service for providers and registered EOHHS staff to report and monitor quality management information for individuals served by the Department of Mental Retardation. (Login required.)

Health & Human Services
Search

Login

Username

Password
(case-sensitive)

Submit

[Forgot password?](#)

Virtual Gateway Help Desk:
1-800-421-0938
1-617-988-3301 (TTY)
9 AM - 5 PM, Monday - Friday

4. Enter **Username** and **Password**.

5. Click the **Login** button.

Note: Security requires that each person have a username and password. Once you are logged in, you will have access to the Virtual Gateway services.



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Password Management

Password policy rules:

- The user will be assigned an ID and temporary password sent through e-mail by the Virtual Gateway help desk
- The user must change their password after first log in
- The password must be between 8 and 12 characters and at least 1 alpha and 1 numeric character
- Passwords are case sensitive
- Users will be automatically logged out of the system after 60 minutes of inactivity.

Once you login, you can change your password.

The screenshot displays the Health and Human Services Virtual Gateway interface. At the top, there is a navigation bar with links for CONSUMER, PROVIDER, RESEARCHER, and GOVERNMENT. A 'Mass.gov' logo is visible in the top right corner. Below the navigation bar, a 'Welcome Jill T...' message is shown. A 'Password Management' popup window is open, titled 'Change Password'. It contains the following text: 'Password should have 8 to 12 characters, and contain at least one alpha and one numeric character.' Below this text are two input fields: 'New Password:' and 'New Password (confirm):'. At the bottom of the popup are 'Submit' and 'Close' buttons. In the background, the main interface shows a 'Return to the HHS Home page' link and an 'Important Notice' section. An arrow points to the 'Password Management' link in the 'Account Management' section.

To change your password:

1. Click the **Password Management** link.
*The **Change Password** popup window appears.*
2. Type new password twice.
3. Click the **Submit** button.
4. Click the **Close** button.



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Accessing Virtual Gateway Services

Here is a view of the Virtual Gateway Business Services page, where you can access each of the available services:

Health and Human Services

Mass.gov

April 13, 2006

CONSUMER PROVIDER RESEARCHER GOVERNMENT

Mass.Gov Home State Government State Online Services

Welcome Provider iuserone

Last Update: April 13, 2006 2:05 PM

Virtual Gateway Business Services

Screening & Referral

Intake

Service Tracking

Electronic Payments

Invoicing

Purchase of Service

Business

Virtual Gateway

Executive Office of Health and Human Services

Mass.gov/eohhs

Search

Health & Human Services

The Virtual Gateway will be unavailable August 24 from 10 PM until 6 AM, for system maintenance.

Virtual Gateway Help Desk:
1-800-421-0938
9 AM to 5 PM Monday - Friday

Services

Catalog of Services

EIM/ESM

Account Management

Password Management

Log Out

[Return to the HHS Home page](#)



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Chapter 2: Contracts

Contracts in EIM/ESM

Only certain types of contracts are included in the pilot release of *EIM/ESM*. The following table lists the contract types included and the billing process for each.

Contract Type	Billing Process
Unit Rate (UR)	<ul style="list-style-type: none">• Client-specific claims/SDRs are submitted.• Payment according to units of service provided to clients.
Master Agreement (MA)	<ul style="list-style-type: none">• Similar to Unit Rate contract• Covers multiple vendors from one funding source.
Cost Reimbursement (CR)	<ul style="list-style-type: none">• Non-client-specific invoice is submitted for cost reimbursement.



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Information Flow

Basic contract information originates in MMARS, is recorded in the Commonwealth Information Warehouse, and flows to *EIM/ESM*, where additional information is added.

Providers are able to view the contract information within *EIM/ESM* and request amendments.



1. MMARS (Massachusetts Management Accounting and Reporting System)

- Initiates all contract set-up and amendments
- Handles all changes to maximum obligation, rates, and vendor codes
- Issues all payments

2. Commonwealth Information Warehouse

- Records contract information
- Forwards to *EIM/ESM*

3. *EIM/ESM* Agency:

- Configures contract details and maintains additional contract characteristics (more information below)
- Activates contract

Providers:

- View current contract information
- Request amendments



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Searching for a Contract

To search for a contract:

1. Click the **Contracts** module from the main menu.
*The **Contract Search** page appears.*

Contract Search			
Provider Organization:	<input type="text"/>	Vendor Customer Code:	<input type="text"/>
Master Contract Number:	<input type="text"/>	Fiscal Year:	<input type="text"/>
Status:	<input type="text" value="Select Below"/>	Contract Type:	<input type="text" value="Select Below"/>
Program:	<input type="text"/>	MA Number:	<input type="text"/>
Activity Code:	<input type="text"/>	Unit Code:	<input type="text"/>
Vendor Contract Number:	<input type="text"/>		
<input type="button" value="Search"/>			

2. Enter search criteria.
3. Click .
Contracts that meet the search criteria appear.

Search Results				
Contract Number	Provider Organization	Contract Type	Status	Current Amount
SCDMH621050060200000	Test Org	COST	Active	\$350,006.83
SCDMH621050060200001	Test Org	COST	Active	\$350,006.83
SCDMH621050060200002	Test Org	COST	Active	\$350,006.83
SCDMH621050060200003	Test Org	COST	Active	\$350,006.83
SCDMH621050060200004	Test Org	COST	Active	\$350,006.83
SCDMH621050060200005	Test Org	COST	Active	\$350,006.83
SCDMH621050060200006	Test Org	COST	Active	\$350,006.83
SCDMH621050060200007	Test Org	COST	Active	\$350,006.83
SCDMH621050060200008	Test Org	COST	Active	\$350,006.83
SCDMH621050060200009	Test Org	COST	Active	\$350,006.83

| Display 1 to 10 of 22 | Next Set >> |

4. Click on a contract number to view the contract summary.
*The **Contract Summary** page appears, displaying information for the current fiscal year.*



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Contract Status A contract may pass through up to four contract states:

Initial Status

- The contract arrives from MMARS in initial status
- Agency staff configures contract and changes status to active, pending, or inactive.
- A contract can't be returned to initial status once it has been moved to another status.

Active Status

- The contract is available for claim/SDR/invoicing processing

Pending Status

- When providers request formal amendments affecting the Maximum Obligation, the contract is placed in Pending status.
- A Pending status indicates the agency is modifying or amending the contract. When modifications are complete, contract will be changed to Active Status

Inactive Status

- The system allows an inactive contract to be moved to active status.
-



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Viewing Contract Information

Providers with appropriate security roles can view additional contract information, but cannot change it.

Information can be accessed from navigation bar on the **Contract Summary** page.

Viewable information includes:

- Fund Allocation
- Amendments
- Line Item Budgets (Cost Reimbursement contracts)
- Unit Allocations (Unit Rate and Master Service Agreement contracts)
- Affiliates
- Programs
- Participating Organizations

Requesting a Contract Amendment

Providers with appropriate security roles can request amendments to a contract through EIM/ESM to adjust:

- The maximum obligation
- Line item budgets or unit allocations
- Contract end date
- Client capacity limit

When an amendment request is received, the agency contract manager sets the contract status to **Pending**; all claims/SDRs and invoices against the contract are also put in pending status.

When the contract amendment is complete, the agency will set the contract status to **Active**.



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Formal Amendment Changes

When formal amendment changes the maximum obligation or the current year obligation, the amendment must be approved by the Comptroller.

Amendments for changes to the contract end date, client capacity, unit allocation and line items budgets are made by an agency contract manager; the Comptroller is not involved.

Contract Amendment Request Process

The amendment request is completed in *EIM/ESM*; once requested, the system emails the information to the Agency Contract Manager.

Request a Contract Amendment:

1. Access the **Contract Summary** page.
2. Click **Request Amendment** in the navigation bar.
*The **Request Amendments** page appears.*
3. Enter amendment information, including a reason for the amendment.
4. Click [**Request Amendment**]
*The **Amendments** page appears. Notification is sent to designated agency staff via email.*

The agency contract manager will process the amendment request, notifying the provider by phone or email when it is complete.



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Chapter 3: Introduction to Billing

EIM/ESM employs three methods of billing:

1. Invoices
2. Claims via Direct Data Entry
3. Claims via Service Delivery Report

The billing method a particular provider uses is determined by:

- The type of contract being billed against
 - The agency issuing the contract
-

Invoices vs. Claims

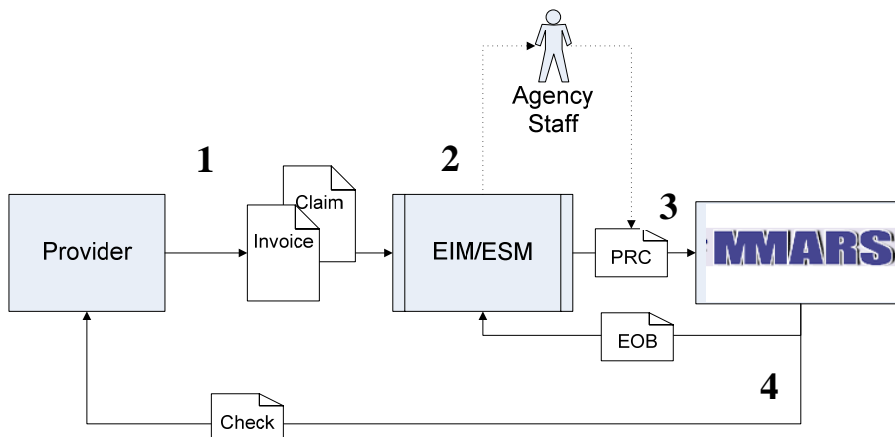
Claims and invoices are both ways to request remittance, but there are some important differences:

Billing Method	Contract Type	Details
Invoices	Cost Reimbursement	<ul style="list-style-type: none">• Must be created sequentially• Covers program-related expenses
Claims	Unit Rate & Master Agreement	<ul style="list-style-type: none">• Create as needed• Covers services delivered to clients enrolled in an activity code



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New Process Overview



1. The provider creates and submits an invoice or claim/SDR within EIM/ESM.
2. The invoice or claim/SDR is validated and adjudicated within EIM/ESM. In some cases, additional agency approval is required.
3. The claim/SDR or invoice is attached to a PRC and approved by the agency before submission to MMARS.
4. MMARS remits payment to the providers and creates an EOB that can be viewed within EIM/ESM.



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Chapter 4: Invoices

Providers use invoices to bill for expenses incurred under Cost Reimbursement contracts.

Cost Reimbursement contracts contain one or more line items, each with a budget.

Invoices contain the line items specified in the contract. Each month, providers update the line items to reflect the month's costs before submitting the invoice.

Invoices **must be submitted sequentially**; if there are no expenses during a billing period, providers must submit a zero balance. If an organization needs to submit more than one invoice a month, a *supplemental* invoice can be created.

Invoice Status

Invoices have the following statuses:

Pre Adjudication Statuses	
Draft	<p>A new invoice is in draft status.</p> <p>An invoice must be in draft status to be edited, deleted or released.</p>
Ready	<p>Once an invoice is released, it is in ready status. An invoice in ready status can be authorized or disapproved.</p> <p>If disapproved, it moves to draft status for changes.</p>
Passed	<p>Once an invoice is authorized, it is in passed status.</p> <p>Passed status indicates the invoice has been passed by the provider and entered the system for adjudication.</p>



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Searching for an Invoice

The search feature enables users to locate any invoice that's been created. A user might want to add information to a draft invoice or check on its status once it's been authorized.

To search for a invoice:

1. Select the **Billing** module and select **Invoice Search** on the navigation bar.

*The **Invoice Search** page appears.*

Home Clients Case Management Authorizations Billing Contracts Credentials Help Logout

Current Location: Billing: Invoice Search

Billing

- » Claim Search
- » PRC Search
- » Invoice Search
- » Explanation of Benefits (EOB)
- » Batch Authorize Claims

Invoice Search

At least one search criteria must be entered

Program Name:

Date From: Date To:

Vendor Customer Code:

Payment Reference Number:

Invoice Status:

2. Enter criteria in one of the following fields:

- Program Name
- Date From
- Date To
- Vendor
- Payment Reference Number
- Invoice Status

Note: Use the wild card % to return all records, or use a partial search to return all records that begin with a letter or text string.



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Searching for an Invoice

(continued)

3. Click **Search**
Search results appear.

Search Results						
Program Name	Date From	Date To	Vendor Customer Code	Payment Reference Number	Contract Number	Status
INDIVIDUAL SUPPORT (BLANKET)	07/01/2005	07/31/2005	VC6000158052	0-07-R	SCDMH621050060	Pending
INDIVIDUAL SUPPORT (BLANKET)	08/01/2005	08/31/2005	VC6000158052		SCDMH621050060	Draft
INDIVIDUAL SUPPORT (BLANKET)	07/01/2005	07/31/2005	VC6000158052		SCDMH621050060	PRC Ready

4. Click the Program Name link.
The Invoice Summary page appears.

Invoice #384							
Update Invoice							
Corporate Name:	Test Org	State Agency Name:	Metro Boston Area Shared				
Vendor Customer Code:	VC6000158052	Invoice Status:	Pending				
Service Contract Number:	SCDMH621050060200000	Service Contract Amendment Number:					
Program Name:	INDIVIDUAL SUPPORT(BLANKET)	Program/Activity Code:	3066				
Billing Period:	07/01/2005 - 07/31/2005	Invoice Reference Number:	0-07-R				
Supporting Documentation Reference Number:		Supporting Documentation Description:					
Supporting Documentation Type:		Invoice Type:	Supplemental				
Service Delivery Report:							
Line Items							
Line Item	Category	Program Component	FTE	Reimbursable Cost	Balance to Date	Invoice Amount	Current Balance
888	1-Direct Care / Program Staff	104 Supervising Professional	2.0	\$120,000.00	\$110,250.00	\$0.00	\$110,250.00
889	1-Direct Care / Program Staff	107 Registered Nurse - Masters, Nurse Psychiatric Mental Health Specialist, Nurse Practitioner, and Nurse - Midwife.	4.0	\$100,000.00	\$97,800.00	\$0.00	\$97,800.00

The **Invoice Summary** page includes information about the invoice, including line items.



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Supporting Documentation

If you have supporting documentation that needs to be provided, there are multiple ways to record this information.

You can use the following fields to record additional information:

Field	Functionality
Supporting Documentation Description	Describe the type of supporting documentation being sent – e.g. ISP form, Long Term Absence Form
Supportive Documentation Type	Select: <ul style="list-style-type: none">• Email• Fax• US Mail from the drop-down box
Service Delivery Report	Type or paste comments or detailed service delivery narratives



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Reviewing Line Items

Cost Reimbursement contracts contain line items, each with a budget. The line items appear in each invoice and are updated to reflect costs for the billing period.

There are two types of line item:

Category 1 line items cover personnel costs in situations where employees are billed to the contract. These line items include staff member names, service periods, and wage amounts.

Line Item	Category	Program Component	FTE	Reimbursable Cost
900	1-Direct Care / Program Staff	104 Supervising Professional	2.0	\$120,000.00
901	1-Direct Care / Program Staff	107 Registered Nurse - Masters, Nurse Psychiatric Mental Health Specialist, Nurse Practitioner, and Nurse - Midwife.	4.0	\$100,000.00

Non-Category 1 line items cover non-personnel costs.

902	2-Other Direct Care/Program Resources	201 Direct Care Program Consultants	0.0	\$15,000.00
903	2-Other Direct Care/Program Resources	204 Staff Training	0.0	\$8,000.00
904	3-Occupancy	390 Facilities Operation, Maintenance, Equipment and Furnishing	0.0	\$60,000.00
905	4-Administrative Support	410 Agency and Program Administration and Support	0.0	\$47,006.83



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Adding a New Invoice

Invoices must be submitted sequentially, even if all amounts are zero. If no invoice was submitted for a previous billing period, a new invoice cannot be added.

To add a new invoice:

1. Select the **Billing** module and **Invoice Search** on the navigation bar.

*The **Invoice Search** page appears.*

2. Click **Add Invoice**

*The **Add Invoice** page appears.*

Add Invoice

*Contract:

3. Select a contract and click

*The **Add Invoice** page expands.*

Add Invoice

*Contract:

Corporate Name: Test Org	State Agency Name: Metro Boston Area Shared
Vendor Customer Code: VC6000158052	Invoice Reference Number: <input type="text"/>
Service Contract Number: SCDMH621050060200000	Service Contract Amendment Number: <input type="text"/>
Program Name: INDIVIDUAL SUPPORT (BLANKET)	Program/Activity Code: 3066
*Billing Period From: <input type="text" value="9/1/2005"/> <input type="button" value="Calendar"/>	*Billing Period To: <input type="text" value="9/30/2005"/> <input type="button" value="Calendar"/>
Supporting Documentation Reference Number: <input type="text"/>	Supporting Documentation Description: <input type="text"/>
Supporting Documentation Type: <input type="text" value="Select Below"/>	Invoice Type: <input checked="" type="radio"/> Regular <input type="radio"/> Supplemental
Service Delivery Report: <input type="text"/>	

4. Enter **Billing Period** dates. The **Invoice Reference Number** field is available for providers who want to enter a reference number for internal tracking purposes.

Note: If an invoice has been submitted for the same billing period, mark the new invoice *supplemental*.



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Adding a New Invoice

(continued)

5. Click

Save New Invoice

The Invoice Summary page appears.

[Search](#) > Invoice Summary

Invoice #386

Update Invoice

Corporate Name:	Test Org	State Agency Name:	Metro Boston Area Shared
Vendor Customer Code:	VC6000158052	Invoice Status:	Draft
Service Contract Number:	SCDMH621050060200000	Service Contract Amendment Number:	
Program Name:	INDIVIDUAL SUPPORT(BLANKET)	Program/Activity Code:	3066
Billing Period:	07/01/2005 - 07/31/2005	Invoice Reference Number:	
Supporting Documentation Reference Number:		Supporting Documentation Description:	
Supporting Documentation Type:	Select Below ▾	Invoice Type:	Supplemental
Service Delivery Report:			

Line Items

Line Item	Category	Program Component	FTE	Reimbursable Cost	Balance to Date	Invoice Amount	Current Balance
900	1-Direct Care / Program Staff	104 Supervising Professional	2.0	\$120,000.00	\$110,250.00	\$0.00	\$110,250.00
901	1-Direct Care / Program Staff	107 Registered Nurse - Masters, Nurse Psychiatric Mental Health Specialist, Nurse Practitioner, and	4.0	\$100,000.00	\$97,800.00	\$0.00	\$97,800.00



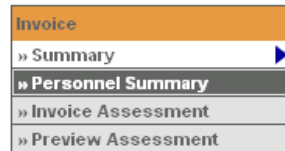
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Updating Category 1 Line Items

Category 1 Line Items are personnel-related and must contain information including the staff member name, the service day/hours, and the amount billed.

To update a Category 1 Line Item:

1. Access the **Invoice Summary** page.
2. Select **Personnel Summary** in the navigation bar.



The Personnel Summary Information page appears.

3. Click **Add Personnel Summary**.
The Personnel Summary Add page appears.

Personnel Summary Information			
*Program Component Position Title:	104 Supervising Professional	*Employee Name:	Provider iinstructor
*Service Days/Hours:	8	*Waged/Salary Amount Paid:	400
Component Total:	0.0	Less Offsetting Support:	125
Component Net Invoice Amount:	0.0		
Add Personnel Summary			

4. Enter all required information.
5. Click **Add Personnel Summary**.
The Personnel Summary page reappears.

Personnel Summary Information						
Program Component Title	Employee Name	Service Days/Hours	Waged/Salary Amount Paid	Component Total	Less Offsetting Support	Component Net Invoice Amount
104-Supervising Professional	Provider iinstructor	8.0	400.0	3200.0	125.0	3075.0
Add Personnel Summary						



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Updating Non-Category 1 Line Items

To update a line item for a cost related to administrative support:

1. Access an invoice.
2. Click a [line item](#) link.
*The **Line Item Summary** page appears.*

Invoice #386			
Update Line Item			
Category:	2-Other Direct Care/Program Resources	Program Component:	201-Direct Care Program Consultants
FTE:	0.0	Reimbursable Cost:	\$15,000.00
Balance to Date:	\$13,800.00	*Invoice Amount:	2000
Current Balance:			\$13,800.00
			Save Changes

3. Enter an invoice amount.
4. Click [Save Changes](#) to update this line item.
*The **Invoice Summary** page appears, displaying the updated line item.*

Saving the Invoice

Users can update the invoice and save changes throughout the month, releasing the invoice at the end of the month when all updates are complete.

To save changes to invoice information and line items:

1. Access the **Invoice Summary** page.
2. Click [Save Invoice](#).
*The **Invoice Summary** page displays the message **Invoice Updated Successfully**. The invoice status remains **Draft**.*



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Releasing and Authorizing the Invoice

When all line items have been updated, the invoice is ready to enter the system for validation and adjudication.


The Invoice Specialist or Billing Specialist **releases** the invoice and the Invoice Authorizer or Billing Supervisor **authorizes** it.

To release an invoice:


1. Access the **Invoice Summary** page.
2. Click .
*The **Invoice Summary** page displays the message **Invoice Released Successfully!!!** The invoice status is changed to **Ready**.*

If the Invoice Authorizer or Billing Supervisor sees an error, the invoice can be **disapproved**, which changes the status from **released** to **draft** so the error can be corrected by the Invoice Specialist.

To disapprove an invoice:

1. Access the **Invoice Summary** page of a released invoice.
2. Click .
*The **Invoice Summary** page appears with the status changed to **Draft**. The invoice can be corrected and released again for authorization.*

To authorize an invoice:

1. Access the **Invoice Summary** page of a released invoice.
2. Click .
*The **Invoice Summary** page displays the message **Invoice Authorized Successfully!!!** The invoice status is changed to **Passed**.*

Practice

Complete a supplemental invoice that includes both Category 1 and non-Category 1 line items.

Save and release the invoice.



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Chapter 5: Service Delivery Reports (SDRs)


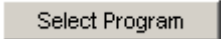
Service Delivery Reports (SDRs) are a method of creating claims in EIM/ESM. An SDR is specific to a contract, month, and location.







Users enter service delivery details for their organization's roster of clients. The SDR is then submitted to EIM/ESM, where the service lines are validated and adjudicated as claims.

Locating the SDR page

An SDR is available for each month the contract is active, and for each location covered by the contract.

To locate an SDR:


1. Select the **Billing** module link. Select **Service Delivery Report** in the navigation bar.
*The **Service Delivery Report** page appears.*
2. Select a contract; click 
3. Select a program; click 
*The **Service Delivery Report** page appears, listing months for the selected contract and program.*

Service Periods		
Month	Year	Location
July	2005	All  
August	2005	All  
September	2005	All  



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Viewing an SDR

1. Access the **Service Delivery Report** page.
2. Within the targeted month, selected a location (or all locations) and click 
*The **Service Delivery Summary** page appears, listing all clients enrolled in programs covered by the selected contract at the selected location.*

Service Delivery Summary																														
Month: November					Year: 2005																									
*Sort By: Client Name					Sort																									
Benson L. Groah	SSN: 111111249	Total Days: 0	Total Units: 0.0	Status: Draft	Location: Bay Cove Human Services	Rate: \$0.00	Activity/Sub-Activity: 3037 - DAY REHABILITATION																							
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Godiva C. Tilton	SSN: 111111210	Total Days: 0	Total Units: 0.0	Status: Draft	Location: Bay Cove Human Services	Rate: \$0.00	Activity/Sub-Activity: 3037 - DAY REHABILITATION																							
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31



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Updating a Service Delivery Header

As a provider, you can use the **Service Delivery Header** to enter the *Invoice Reference Number*, which is unique to the SDR.

To update a **Service Delivery Header**:

1. From the **Service Deliver Summary** page, select **Service Delivery Header** on the navigation bar.
The Service Delivery Header page appears.

Service Delivery Header	
Contract #SCDMH634050060920000	
Contract Identifier Number: SCDMH634050060920000	Contract Type: UNIT
Service Delivery Header	
Provider Organization: Bay Cove Human Services	
Vendor Customer Code: VC6000162461	SDR Reference Number: <input type="text"/>
Address ID: AD001	Program Name: DAY REHABILITATION
Activity Code: 3037	
Effective From: 07/01/2005	Effective To: 06/30/2006
Payer Organization: Bay Cove Site Office	
Provider Contact Name: Provider userthree	Agency Contact Name: Agency instructor
User Name: puinstructor	Associated Organization: Bay Cove Human Services
Grand Total Amount: \$0.00	Grand Total Units: 0.0
SDR Offset Amount: <input type="text" value="0.0"/>	SDR Offset Reason: <input type="text" value="Select Below"/>
Processed Offset Amount: \$0.00	
Date Created: 03/27/2006 05:51:44 PM	Created By: puuserfour
Date Changed: 04/25/2006 04:03:24 PM	Changed By:

2. Enter your organization's unique provider invoice reference number in the **SDR Reference Number** field.
3. Click **Save Changes**.

Note: SDRs can be resubmitted by an agency after the original SDR has been released and authorized. At the time of resubmission, the header information can be changed.



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Recording Service Information

The SDR feature enables users to enter information for a single client or multiple clients at once.

To record service information for a single client:

1. Access the **Service Delivery Summary** page.
2. Click client name link.

*The **Record Service Delivery** page appears.*

Record Service Delivery for Client #11964 : Benson L. Groah																																																							
Service Period: November 2005				Location: Bay Cove Human Services																																																			
Authorization Number:				Accounting Line Number:																																																			
Enrollment From: 11/01/2005				Enrollment To: 06/30/2006																																																			
Total Service Days:				Total Units:																																																			
Offset Amount: 0.0				Offset Reason: Select Below																																																			
Processed Offset Amount: \$0.00																																																							
Offset Start Date:				Offset End Date:																																																			
Total Invoiced Dollar Amount: \$0.00				Service Item Status: Draft																																																			
Agency Area Office:																																																							
Reason For Voiding:																																																							
<table border="1"><thead><tr><th>Sunday</th><th>Monday</th><th>Tuesday</th><th>Wednesday</th><th>Thursday</th><th>Friday</th><th>Saturday</th></tr></thead><tbody><tr><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr><tr><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td></tr><tr><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td></tr><tr><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td><td></td></tr></tbody></table>														Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday																																																	
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6	7	8	9	10	11	12																																																	
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20	21	22	23	24	25	26																																																	
27	28	29	30																																																				



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Recording Service Information

(continued)

- Complete the service details by entering a number of service units and an attendance code.

21	6	X	22		-	23	6	X
28	6	X						

- Click **Save Draft**.

The Service Delivery Summary page appears.

Benson L. Groah	Location:	Rate: \$65.70	Activity/Sub-Activity: 3037 - DAY REHABILITATION
------------------------	------------------	----------------------	--

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
																				X - 6		X - 6						X - 6			

Attendance Codes

Attendance codes are a required part of recording services.

Attendance codes may differ from program to program; a key to the available codes is found at the bottom of the **Record Service Delivery** page.

Key

Service Code	Description	Attendance Status Code	Unit Type	Unit Increment
DAY	DMH Day	X-Present	Minutes	15
DAY	DMH Day	S-Sick	Minutes	15
DAY	DMH Day	A-Absent	Minutes	15

If client is sick or absent, enter a zero along with the status attendance code.



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Copying Characteristics

The **Copy Characteristics** feature allows a user to copy service delivery information, from one client to another.

To copy service delivery information:

1. Access the **Record Service Delivery** page for a client. Enter service delivery information if needed.

2. Click **Copy Characteristics**.

A list of clients appears.

Select Clients		
<input type="checkbox"/> Select all clients		
Select	Name	SSH
<input checked="" type="checkbox"/>	Tilton, Godiva	111111210
<input type="checkbox"/>	Busk, Jordyn	111111267
<input type="checkbox"/>	Minnie, Jeanette	111111308

3. Select one or more clients and click **Apply Pattern**.
*The **Service Delivery Summary** page appears, displaying the copied service delivery dates.*

<u>Benson L. Groah</u>	Location:	Rate: \$65.70	Activity/Sub- Activity: 3037 - DAY REHABILITATION												
1	2	3	4	20	21	22	23	24	25	26	27	28	29	30	31
					X - 6		X - 6					X - 6			
<u>Godiva C. Tilton</u>	Location:	Rate: \$65.70	Activity/Sub- Activity: 3037 - DAY REHABILITATION												
1	2	3	4	20	21	22	23	24	25	26	27	28	29	30	31
					X - 6		X - 6					X - 6			



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Applying a Service Delivery Pattern

When most of the roster receives the same services on the same days (as happens in residential care, for example), a service delivery pattern can be created and applied to several clients.

1. Access the **Service Delivery** page.
2. Click **Service Delivery Pattern** in the navigation bar.
The Service Delivery Pattern page appears.
3. Complete the service delivery pattern information.

Service Delivery Pattern	
*Pattern Preference:	<input type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat
*Units:	<input type="text" value="1"/>
*Program:	DAY REHABILITATION <input type="button" value="Select Program"/>
*Code:	X-Present-DAY <input type="button" value="Select Code"/>

4. Select all clients who receive information in this pattern.

Select Clients		
<input type="checkbox"/> Select all clients (Note: At least one client has to be selected before Applying pattern)		
Select	Name	SSN
<input checked="" type="checkbox"/>	Godiva C. Tilton	111111210
<input checked="" type="checkbox"/>	Benson L. Groah	111111249
<input checked="" type="checkbox"/>	Jeanette D. Minnie	111111308
<input type="checkbox"/>	Jordyn B. Busk	111111267
		<input type="button" value="Apply Pattern"/>

5. Click
The Service Delivery Summary page appears.



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Releasing and Authorizing an SDR

When all service delivery information has been entered, the SDR is ready to enter the system for validation and adjudication as a series of claims.

The SDR Specialist or Billing Specialist **releases** the SDR and the Billing Supervisor or SDR Authorizer **authorizes** it.

To release an SDR:

1. Access the **Service Delivery Summary** page.
2. Click **Release Service Delivery**.

The status of the SDR is Released

If an SDR Authorizer or Billing Supervisor sees an error, the SDR can be **rejected**. Rejecting the SDR changes the status from **released** to **draft** so the error can be corrected.

To reject an SDR:

1. Access the **Service Delivery Summary**.
2. Click **Reject Service Delivery**.

*The Service Delivery Summary page appears with the status changed to **draft**. The SDR can be corrected and released again for authorization.*



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To authorize an SDR:

1. Access the **Service Delivery Summary** page.
2. Click **Authorize Service Delivery** ..

Authorization begins and the following message appears:

Current Location: Billing: Service Delivery Report > Service Delivery Summary	
Service Delivery Report	Contract #SCDMH634050060920000
» Service Delivery Summary	Service Delivery Summary
» Service Delivery Header	Access to the object is temporarily restricted - the object is being processed, Please access after some
» Service Delivery Pattern	
» Notes	

3. Click SDR on breadcrumbs, select month again, and check status.

Service Delivery Summary				
Month: February				
*Sort By: Client Name		Sort		
Benson L. Groah	SSN: 111111249	Total Days: 3	Total Units: 18.0	Status: Authorized

Practice

Locate the SDR for the following month; enter services by copying characteristics or creating a service delivery pattern.

Release and authorize the SDR.



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Chapter 6: PRCs

PRCs

You can search for and update PRCs.

Invoice Statuses

Invoices have the following statuses:

Post Adjudication Statuses	
PRC Ready	Once an invoice has been passed, it will be moved to this status. PRC Ready status indicates the invoice is ready for Program Manager approval.
PM PRC Approve	Program Managers have approved.
ACTG PRC Approve	Accounting has approved.
PRC Submitted	3 day wait while MMARS processes the invoice.
PRC Paid	EOB is available.



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Searching for a PRC

1. Select the **Billing** module and select Search for PRC on the navigation bar.
The Search for PRC page appears.

PRC Search

Program Name:	DAY REHABILITATION	Date From:		Date To:	
Fiscal Year:		Organization:	Select Below	Vendor Payment Number:	
Provider Organization:		Status:	Select Below	Vendor Customer Code:	
Contract Number:		Unit Code:			

Search

Search Results

Program Name	Program/Activity Code	Scheduled Pmt Date	Fiscal Year	Organization	Vendor PRC Number	Document Total Amount	Status
DAY REHABILITATION	3037	03/24/2006	2006		INTF63400660920	\$21.90	Paid

2. Enter search criteria and click **Search**
Search results appear.
3. Click the Program Name link.
The Update PRC page appears.

Update PRC

PRC Document Information

Document Category:	AP	Document Type:	PR
Document Code:	PRC	Department Code:	DMH
Unit Code:	6340		
Document ID:	INTF6340066092000000	Document Version Number:	1
Document Import Mode:	OE		
Document Vendor Line Number:	1	Vendor Customer Code:	VC6000162461
Address Code:	AD001		
*Scheduled Pmt Date:	03/24/2006		
*Record Date:	03/24/2006	Accounting Period Number:	9
Vendor PRC Number:	INTF6340066092000000	*Vendor PRC Date:	03/24/2006
*Budget Fiscal Year:	2006	*Fiscal Year:	2006
Status:	Paid		
MMARS EFT/Check Number:	815652		
Document Total Amount:	\$21.90		

The organizations unique provider identification number is highlighted in red.



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Explanation of Benefits (EOB)

The same unique provider identification number is viewable on the EOB.

EOB #141				
Contract Information				
Number: SCDMH634050060920000				
Payer Information				
Name:				
Payee Information				
Name:				
PRC Information				
Number: INTF6340066092000000		Check Amount: 21.9		
Date: 03/24/2006		Amount: 21.9		
Transaction Information				
Date Sent: 03/27/2006				
Status: Ready				
Provider Adjustments				
Fiscal End Date	Adjustment Reason	Provider Identifier Id	Provider Adj Identifier Id	Provider Adjustment Amount
06/30/2006	W/O			\$0.00



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Chapter 7: Remittance

An Explanation of Benefits (EOB) or *remittance* is information about a payment made after the adjudication process is complete. The EOB contains information about the payment remitted including:

- Transaction information showing the date payment was sent
- Status of the transaction
- Contract information
- Payer information
- Payee information
- PRC information

Viewing an EOB

Providers can check payment status for claims/SDRs and invoices within EIM/ESM.

1. Select the **Billing Module** link. Select **Explanation of Benefits (EOB)** in the navigation bar.
*The **EOB Search** page appears.*

Explanation of Benefits (EOB)			
At least one search criteria must be entered			
Contract Number:	<input type="text"/>		
Payer:	<input type="text"/>	Payee:	<input type="text"/>
Transmission Date From:	<input type="text"/>	Transmission Date To:	<input type="text"/>
PRC Number:	<input type="text"/>		
PRC Submission Date:	<input type="text"/>		
PRC Amount Start Range:	<input type="text"/>	PRC Amount End Range:	<input type="text"/>
EOB Transmission Status:	Select Below		
			<input type="button" value="Search"/>



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Viewing an EOB

(continued)

2. Enter search criteria.
3. Click **Search**.
Search results appear.

Search Results							
Contract Number	Payer	Payee	Date Sent	PRC Number	PRC Date	PRC Amount	Status
SCDMH634050			03/27/2006	INTF634006609	03/24/2006	\$21.90	Ready

4. Click the Contract Number link.
*The **EOB Summary** page appears.*

EOB #141				
Contract Information				
Number:	SCDMH634050060920000			
Payer Information				
Name:				
Payee Information				
Name:				
PRC Information				
Number:	INTF6340066092000000			
Date:	03/24/2006			
Check Amount:	21.9			
Amount:	21.9			
Transaction Information				
Date Sent:	03/27/2006			
Status:	Ready			
Provider Adjustments				
Fiscal End Date	Adjustment Reason	Provider Identifier Id	Provider Adj Identifier Id	Provider Adjustment Amount
06/30/2006	WVO			\$0.00



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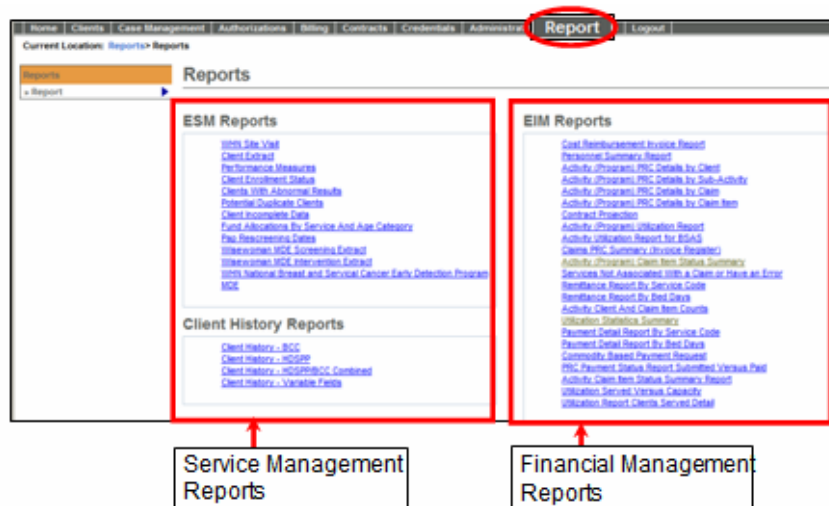
Chapter 8: Reporting

Typically, reports are generated by an authorized user who chooses report content and format as part of submitting a reporting request.

Accessing the Reporting Feature

To access the reporting feature of *EIM/ESM*:

1. Access the **Reports** module.
A list of Financial and Service Management reports appears.



Note: Access to reports is based on user security roles.

Entering Report Criteria

Criteria selection tailors report results. By entering criteria, a user can determine the details and grouping of the report data. Criteria include dates, programs, locations, and contract numbers, etc.

To enter criteria and run a report:

1. Access the **Reports** module.
A list of Financial and Service Management reports appears.
2. Click the [name of the individual report](#) link.
A Report Criteria page appears.



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Fields Marked With an Asterisk (*) Are Required
Invoice dates and Budget Fiscal Year are required if you do not enter a PRC Number.

Invoice Reference Number:	<input type="text"/>	PRC Number:	<input type="text"/>
Contracting Provider Name:	Select Below <input type="button" value="v"/>		
Invoice From Date:	<input type="text"/>	Invoice To Date:	<input type="text"/>
Invoice Status:	Select Below <input type="button" value="v"/>		
Activity:	Select Below <input type="button" value="v"/>		
Contract Number:	Select Below <input type="button" value="v"/>		
Budget Fiscal Year:	<input type="text"/>	*Generate Personnel Summary?	Yes <input checked="" type="radio"/> No <input type="radio"/>
Unit Code:	Select Below <input type="button" value="v"/>		
*Report Format:	PDF <input checked="" type="radio"/> Excel <input type="radio"/>		
<input type="button" value="Run Report"/> <input type="button" value="Clear"/>			

Note: The **Report Criteria** page will differ depending upon the specific report being requested.

3. Enter criteria.

Important: Report criteria is not printed on the report or preserved in the system. Users may find it helpful to record criteria manually.

4. Select **Report Format**.

5. Click .

A file is generated that users may save for later viewing.